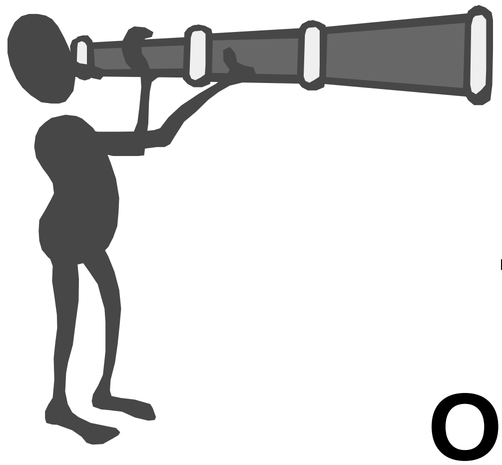


TEAMS OVERVIEW

- **Historical Information about TEAMS**
- **System Security, Hours, Resources, Help Desk**
- **System Features:**
  - Navigating through TEAMS
  - Error/Warning Messages
  - ABEND Screen
  - Case Structure
  - Programs and Subtypes
  - Tables and Codes
  - Benefit Months
  - Issuance Process
  - Online vs. Batch Processing
  - Editing Information on Screens

Historical Information about TEAMS

Montana received federal approval to develop The Economic Assistance Management System (TEAMS) on September 17, 1987. TEAMS began as an integrated AFDC, Food Stamps and Medicaid automated eligibility determination system. TEAMS was completed in two stages: Phase 1, the planning, preparation and analysis stage, and Phase 2, the development and implementation stage.

Phase 1 began in March of 1988. Activities throughout that phase included the analysis and selection of a system, the definition of the department's specific system requirements, development of an external system design, and the preparation of an implementation plan.

Phase 2 began in March of 1990. The six major accomplishments during Phase 2 were initiation of the project organization and work plan, modification of the external design, internal design development, programming, testing, and implementation. TEAMS was then implemented over a four-month period beginning in August and ending in November. Each TEAMS user attended a one-week training session immediately preceding conversion.

Conditional federal approval for the MACCS (Montana Automated Child Care System) project was obtained February 25, 1994. The project start date was April 18, 1994. Final federal approval was obtained in July 1994. The MACCS application has been integrated into The Economic Assistance Management System (TEAMS). All counties have had access to TEAMS since June 23, 1995.

In early 1995 BDM Technologies began work on the FAIM project. The purpose of this project was to modify the TEAMS system to calculate and issue benefits based on Montana's new welfare reform policy for the AFDC, Food Stamps and AF-related medical assistance programs. All counties were converted to FAIM by July 1997 benefits.

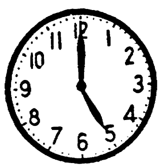
TEAMS is now in the facilities management stage of its development. BDM became known as TRW (following its acquisition by TRW in December 1997). Northrop Grumman purchased TRW in December 2002. Northrop Grumman is now responsible for the support of TEAMS, including online and batch processing; scheduled production jobs; application software development, maintenance, testing, and integration; training of users; help desk services; ad hoc inquiries, reports and extracts; database, file, and library maintenance; backup, restoration, and reorganization; and TEAMS software and RJE security administration.

TEAMS is the largest online computer system of its kind in the state of Montana. There are approximately 350 users located in 46 county offices throughout the state.

System Security

- You have a password to the State mainframe in addition to your office's network password
- Passwords are for your protection!
- Your mainframe password must be six characters (it's best to use both letters and numbers)
- You must change it every 60 days

TEAMS Hours



- TEAMS is available from **6:00 a.m. to 6:00 p.m.** on normal workdays.
- If this schedule changes temporarily, or if the system will be unavailable due to scheduled maintenance, there will be a message on the TEAMS 'logo' screen a day or two in advance.

System Resources for Users

Policy Manuals

- There is a policy manual for each program
- They are maintained by DPHHS
- They contain some information about which codes should be entered in TEAMS based on policy

Online Help

- Online Help in TEAMS consists of "Field help" (which provides the valid codes for a field).
- Instructions for using Online Help can be found elsewhere in this manual.

TEAMS User Guide

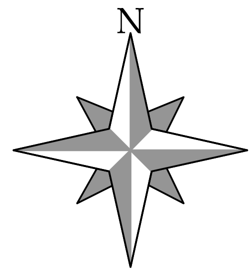
- The manual you are reading is a comprehensive guide for system users.

TEAMS Help Desk

- **Call 1-800-285-2361** if you have problems or questions about using TEAMS.
- Help Desk hours: **7:30 am – 5:30 pm M-F**
- In some counties, supervisors prefer that you bring the question to them before calling the Help Desk.

TEAMS Features

Navigating Through TEAMS



To log on to the system, see the Process Guide “Logging On and Off TEAMS” elsewhere in this User Guide. Once you are logged on to the system, there are several ways to get around.

One way to access TEAMS screens is to use **menus**. The SYSE screen is a menu, and is the starting point for all other screens and menus in the system. There is a list of menus on the top portion of SYSE, and the user can access one of those menus by using the TAB key to place the cursor next to an option, typing any character, and pressing Enter. Menus are described more fully in another section of this manual.

Another way to move from screen to screen is to use the **NEXT** (or “Nexting”) field in the bottom right corner of the screen. To do this, you must first have entered a case number and benefit month on SYSE or another menu; then type the four-character acronym for the desired screen in the Nexting field. The Nexting field is described in more detail later in this manual.

There is also a **default screenflow** for each program. These are the screens used for recording case information and determining eligibility. When one screen in the default screenflow is accessed, TEAMS will move the user automatically to the next screen when Enter is pressed. The default screenflow is described more thoroughly later.

New users will probably be more comfortable following the default screenflow and using menus. Experienced users will probably prefer the Nexting function to move from screen to screen.

TEAMS Menus

Menus display a list of other menus, screens or functions. Examples of menus in TEAMS include the SYSE (System Selection) menu; the ELTM (Eligibility Technician) menu, and INME (Inquiry Menu). The SYSE menu (which is the starting point for TEAMS) itself lists several other menus and functions in the top section. That list will vary depending on your security level, job type, etc.

To select a menu option, type a character in the space to the left of it and press Enter. (Choose only one option.) Sometimes additional information must be entered first at the bottom of the menu screen, such as Case Number, Benefit Month, Program Type/Subtype, etc.; an error message will indicate if more information is required. Once all required information is typed on the screen, press Enter. The requested screen, menu, or function will then be accessed.

NEXTing Screen Function

TEAMS users can select a specific screen or menu to be displayed next. To do this, enter the four-character acronym for the desired screen in the 'NEXTing' field at the bottom right-hand corner of the screen and press Enter. The system will advance to the specified screen, if access to that screen is allowed from the current screen and it is appropriate for your security level.

If you are not allowed to NEXT to the screen you requested, an error message will display. This can happen if, for example, insufficient data was entered (e.g. no benefit month specified) or the requested screen can only be accessed from a specific menu or screen.

NOTE: The four-character screen acronym is derived from the screen's name. For screens with a one-word name (such as 'Expenses'), the first four letters form the acronym (EXPE). For two-word names (such as 'Application Maintenance'), the first two letters of each word are used (APMA). For screen names with three or more words (such as 'Residency/Citizenship/Identity'), the first two letters of the first word are used, plus the first letter of the second and third words (RECI). These are general rules; exceptions do exist.

'Quick Access' Function

'Quick Access' fields or 'SELect' fields are available on some screens and are similar to but faster than Nexting. These fields are found on several screens, such as Resource Determination screens (EXRA, EXRF, EXRM, etc.) and Eligibility Determination screens (AFED, FSED, MAED, etc.), where they provide a quick way to access another screen. To use a Quick Access or Select field, type any character in the field and press Enter. For example, on the TICI screen, type any character in the 'TICU' field to view the Timeclock Update (TICU) screen.

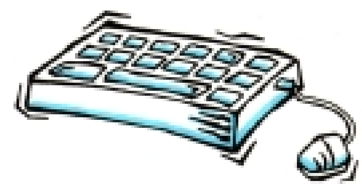
Default Screenflow

The screens that are required for setting up and maintaining case eligibility are chained together in a "default screenflow." The screenflow varies for each program depending on the information required for each. When more than one program is registered for a case (e.g., Food Stamps and TANF Cash assistance), the two default screenflows are "blended" together by TEAMS so that the caseworker automatically accesses all screens required for both programs.

When all of the data required for each screen is correctly entered, TEAMS advances to the next screen in the screenflow. Users who only use those screens to "inquire" (to view case information) can also use the default screenflow. Pressing Enter moves automatically from one screen to the next, as long as no other screen is requested in the NEXTing field.

- Note: Sometimes there is too much information to display on one screen (for example, income screens can display only three family members at one time). In these situations, there will be multiple pages of the same screen. When Enter is pressed on such screens, TEAMS will display the 2nd page before moving on to the next screen in the screenflow, unless an 'N' is entered in the 'More Clients?' field at the bottom of the screen.

Keystroke Functions



Another way to navigate through TEAMS is by using function keys (F1-F12). Each of these keys has a specific function within TEAMS:

F1 - Online Help

F1 is used to request Online Help. Instructions for using TEAMS Online Help can be found elsewhere in this User Guide.

F2 - Previous Menu

F2 returns to the previous *menu* that was accessed.

F3 - System Selection (SYSE) Menu

From any TEAMS screen, pressing F3 will always return to the SYSE menu (the main system menu).

F4 - Case Summary Screen

On screens that require a POA (Position on Application) number to be entered, F4 displays the CASU (Case Summary) screen, which lists all participants in the case and their POA numbers. To exit CASU and return to the previous screen, press Enter.

F6 - Page 1 of multi-page screen

On certain multi-page screens (such as SEPA), the F6 key will return to the first screen. F6 is also used for "word wrap" on CANO (Case Notes) and CONO (Component Notes).

F7 - Page Backward

F7 pages backward (up) in Online Help as well as on certain screens. For example, when viewing Case Notes (CANO), pressing F7 displays the previous case note, if any.

F8 - Page Forward

F8 pages forward (down) in online help and on certain screens such as CANO.

F9 - Exit Case Notes (CANO)

After entering a case note on the CANO screen, F9 returns to the screen from which CANO was accessed (see F10 below). Remember to press Enter to save the note first!

F10 - Access Case Notes (CANO)

On most screens, pressing F10 accesses the Case Notes screen.

F12 - Refresh/Redisplay

F12 clears prior information entered on inquiry screens (such as CLIR, CLIM, CLIN).

Pause

Pressing PAUSE is the first step in signing off TEAMS. (Before pressing PAUSE on any screen, remember to press Enter first to store any newly added information.) See the Process Guide “Logging On and Off TEAMS” for a complete description of the process.

Escape (ESC)

When the system is locked up (displays in the lower left corner of the screen), press ESC to unlock it. Some reasons the system may lock up are:

- You have tried to type in a non-enterable field
- You have typed alpha characters when numbers are required, or vice versa.
- The system was still processing a previous command when you gave it a new command. displays when TEAMS is still processing.

Tab

The Tab key moves the cursor to the beginning of the next enterable field.

Shift-Tab

Holding down the SHIFT key and pressing TAB performs a backward tab. The cursor will move back to the previous enterable field.

CTRL

The CTRL key below the right-hand Shift key moves the cursor downward, to the first available field on the next line.

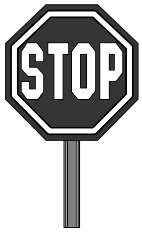
Home

HOME places the cursor at the first enterable field on the screen.

Enter

The Enter key tells the system to process the information that was just typed on a screen. The symbol will display after Enter is pressed, and indicates the command is being processed. Note: Depending on how your keyboard is mapped, your 'Enter' key may serve as the 'Ctrl' key and vice versa.

Error/Warning Messages



When data is entered on a screen and Enter is pressed, TEAMS checks to make sure all codes are valid and that dates and other data are within certain parameters. If invalid data is found, TEAMS displays an error message (also called an “edit”) at the bottom of the screen, and highlights the problem field. Processing cannot continue until the error is corrected.

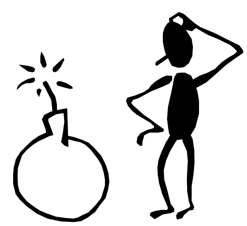
Only one error message can be displayed at one time. After the first correction is made, another message could display if there is another error.

Some messages will be preceded by the word 'WARNING.' They inform the user of a possible problem, but they do not stop further processing. Make updates if necessary, and then press Enter to continue working the case. Warning messages display only after all other errors are corrected.

Occasionally, an ‘Abort’ message will be displayed. This occurs when there is a mainframe database problem. Please do not try to correct the problem. Print out the screen, remember what steps you had taken prior to the problem, and call the TEAMS Help Desk immediately.

Abend Screen

If the system detects a problem within the computer program that operates TEAMS, the system makes an automatic recovery and the ABEND (abnormal end) screen is displayed. This screen is an important diagnostic aid to the system support group.



If you receive an ABEND message, follow these steps.

STEP 1 Make a screen print of the ABEND message.

STEP 2 Write down the action(s) which preceded the ABEND, including the screen you were on, the case number, program, and benefit month being worked, the data that was entered, the keys you pressed, etc.

STEP 3 Press F3 to exit out of the ABEND screen. Log back on to TEAMS.

STEP 4 Repeat the actions that led up to the ABEND, printing off each of the screens.

STEP 5 Call the TEAMS Help Desk with the problem. If they request it, send all the supporting documentation to them. If possible, avoid the situation that caused the ABEND until you are notified that the problem has been resolved.

Case Structure

A household might be eligible for one type of assistance or several. All members, and all the assistance programs they receive, are generally managed in one case. Having one case means all information can be displayed at once.

Eligibility Case Managers take information from the application for assistance and the personal interview, and enter information in TEAMS to build the case. They then determine which programs/subtypes the members are eligible for.

Programs and Subtypes

Some programs (like Medicaid) have “subtypes” because there are several subprograms available within them. Policy differs between the subprograms, and subtype codes allow the system to differentiate them and calculate eligibility and benefits properly for each. (The programs and subtypes and their codes are listed on the next page.)

Involvement Units

Within the case, some members might participate in some programs and not in others. TEAMS will look at each program or subtype in a case as a separate entity called an Involvement Unit (IU). Each IU can be like a case-within-a-case, depending on the participation of the persons involved.

As stated before, TEAMS differentiates the various subtypes by their codes. Therefore, two IU’s of the <u>same</u> type cannot coexist in one case. Some programs are designed for one person only (such as certain SSI-related Medicaid subtypes), so if two household members are eligible, they must be set up on two different case numbers.

Participation Codes

A case can be registered for several programs and therefore have several IU’s. But, because policy differs between the programs, household members might be eligible for some programs and not others. The worker must indicate the *participation* of each member in each IU through the use of participation codes.

Participation codes tell the system which members are eligible in that IU, and whether their income and resources are counted in determining eligibility for the household. They *must be entered correctly per policy* because they are the most important factor in determining eligibility for each member and for the case as a whole.

Programs and Subtypes

Codes for each program and subtype are shown, along with their descriptions.

Programs that do not have subtypes:

AF	TANF Cash (cash assistance)
EM	Emergency Assistance
FS	Food Stamps

FAMILY-RELATED MEDICAID subtypes:

MA-FM	Family Medicaid
MA-BC	Medicaid for Breast/Cervical Cancer Prevention and Treatment
MA-QP	Medicaid for Qualified Pregnant Women
MA-AN	Automatic Newborn coverage
MA-PW	Medicaid for Poverty Pregnant Women
MA-PC	Medicaid for Poverty Children
MA-PS	Medicaid for Poverty Six Eligible Children
MA-RK	Ribicoff Children

Adoption/Foster Care subtypes:

MA-AD	Subsidized Adoption
MA-FF	Medicaid for IV-E Foster Care
MA-FW	Medicaid for CWS Foster Care

Continuous Medicaid subtypes:

MA-CP	Continued Eligibility for Pregnant Woman
MA-EP	Extended Medicaid for Pregnant Women
MA-EC	Extended Child/Spousal Support
MA-TR	Transitional Extended Medicaid - for FAIM Financial households who no longer are eligible due to increased earnings, etc.

SSI-RELATED MEDICAID subtypes:

MA-IAInstitutionalized Aged person (living in a nursing home)
MA-IDInstitutionalized Disabled or blind person (living in a nursing home)

MA-MA	Medicaid for an Aged person
MA-MB	Medicaid for a Blind person
MA-MD	Medicaid for a Disabled person
MA-SA	Medicaid for an Aged person who receives SSI/State Supplement
MA-SB	Medicaid for a Blind person who receives SSI/State Supplement
MA-SD	Medicaid for a Disabled person who receives SSI/State Supplement
MA-WA	Medical Assistance for an Aged person who meets Waiver requirements
MA-WD	Medical Assistance for a Disabled person who meets Waiver requirements
MA-WO	Medical Assistance for persons who meet Waiver requirements for Other reasons

QUALIFIED MEDICARE BENEFICIARY (QMB):

- *QMB pays for Medicare Part A premium (if any), Part B premium, and Medicare copays. It has higher income and resource standards than SSI-related Medicaid programs.*

QM-QA	Qualified Medicare Beneficiary benefits for Aged persons
QM-QB	Qualified Medicare Beneficiary benefits for Blind persons
QM-QD	Qualified Medicare Beneficiary benefits for Disabled persons

SPECIAL LOW-INCOME MEDICARE BENEFICIARY (SLMB) and QUALIFIED INDIVIDUALS:

- *Both the SL-SL and SL-Q1 programs pay the Medicare Part B premium for the participant (the income standards are different for each). The SL-Q2 program has the highest income standard, and it pays for only a small portion of the Medicare B premium.*

SL-SL	Special Low-Income Medicare Beneficiary
SL-Q1	Qualified Individual-1

Tables and Codes

Most of the information that workers enter into TEAMS is based on codes. The system understands the codes because it has *tables* programmed within it which tell it whether the codes are valid, and if so, how to process that information.

For example, there are codes for the various types of earned and unearned income a person might have. The worker enters the appropriate code and the dollar amount on the appropriate screens, and TEAMS processes that information based on policy.

In addition to codes, tables contain values for various aspects of policy (such as income and resource limits, time and age limits, etc.), so that current policy is always applied.

Table values are dated, so when an update is made, the 'old' values are still available for recalculation of benefits for past months, for viewing eligibility for past months, etc.

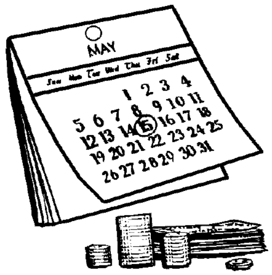
- Tables can be viewed online. On the SYSE menu, choose TAME (Table Maintenance Menu). TAME is shown below, and is a list of several *categories* of tables. When one category is selected (such as TAM1), the tables in that category will be listed. Selecting an option on the resulting list would display an individual table.

- Press F2 to step back one level.

```
TAME           TABLE MAINTENANCE MENU

         _  TAM1   TABLE MAINT CODES A-F
         _  TAM2   TABLE MAINT CODES G-P
         _  TAM3   TABLE MAINT CODES Q-Z
         _  TAML   TABLE MAINT LOCATION/NOTICES
         _  TAMA   TABLE MAINT AFDC
         _  TAMH   TABLE MAINTENANCE CC MENU
         _  TAMF   TABLE MAINT FOOD STAMPS
         _  TAMM   TABLE MAINT MEDICAID
         _  TAMQ   TABLE MAINT QMB
         _  TAMS   TABLE MAINT SLMB
         _  TAMC   TABLE MAINT COUNTY
         _  TAMO   TABLE MAINT OPERATIONS
         _  TAMT   TABLE MAINT TECHNICAL
         _  SYUS   SYSTEM USER SECURITY
```

Benefit Months



Information is entered on TEAMS for one benefit month at a time. Data input for the current month will be copied forward into the next month by one of two processes:

- For newly entered cases, the worker will create a case for the calendar benefit month, and then will use the CODF (Copy Details For New Month) function to copy data into the next calendar month. From then on, benefits will always be worked a month ahead.
- For ongoing cases, the "rollover" process runs on the last working day of a month to copy all authorized cases into the next benefit month. For example, on the evening of September 30, the rollover process would copy cases into the benefit month of November.

Issuance Process

The worker must authorize the case on the appropriate authorization screen(s) for issuance to take place. Regular, monthly payments are issued four working days before the end of the previous month for ongoing cases. For example, on September 27, issuance is run for October (unless September 27 is a weekend). This process is called Monthly Issuance. For new cases created in the calendar month or for replacements/supplements, issuance is run on a daily basis. For example, if a family applied for benefits on September 14th, the Daily Issuance process would generate their prorated benefits for the rest of September.

Benefits are mailed on the next working day following issuance. Some TANF Cash and Medicaid documents are printed by TEAMS; Food Stamps and some TANF Cash benefits are issued through the *Montana Access* system, either direct deposit or on an EBT (Electronic Benefits Transfer) card.

Online vs. Batch Processing

Online processing is immediate--when the ENTER key is pressed. The worker receives immediate validation of the information that was entered, or immediate notification of errors via error messages. Application registration and benefit determination are online processes.

Batch cycles are used to process information in "batches" at night. Batch processes are used for reports, interfaces and notices because they take more system time. Other batch processes include monthly issuance of benefits and "rollover" of benefits into the next month.

Editing Information on Screens

To correct an error on a screen, or to update information on a screen, simply type over the incorrect information with new data and press Enter when finished.

To delete information from a field, either use the END key to wipe out all data, or use the Spacebar to overwrite the data in the field. Remember to press the Enter key after making any changes; otherwise, the changes will not be processed.